

PROJECT NARRATIVE

TABLE OF CONTENTS

Introduction	1
Response to Priorities	2
Significance	3
Strategy to Scale	11
Quality of Project Design and Management Plan	26
Quality of Project Evaluation	38
Bibliography	50

INTRODUCTION

In 2010, Children’s Literacy Initiative (CLI), a national 501(c)(3) headquartered in Philadelphia (PA), won a \$21.7M i3 Validation grant to improve the effectiveness of kindergarten through third-grade (K-3) teachers in 38 schools in four, low-performing, urban districts. CLI reached close to 500 teachers each year and impacted more 55,000 high-need students over the five-year grant period. As part of its Validation grant, CLI partnered with American Institutes for Research (AIR) to evaluate the effectiveness of CLI’s intervention to impact teacher practice in ways that improve student reading achievement. In its report on results from a three-year impact evaluation, AIR concluded, “the CLI program produces substantial effects on teachers’ classroom environment and literacy practices, which in turn, lead to measureable effects on average reading achievement in early elementary grades.” (*see Appendix D*; American Institutes for Research, 2015). It is not by chance that students in CLI-served classrooms read, on average, as though they had two months more of instruction than their

counterparts in similar classrooms. With demonstrable results, CLI learned much from its Validation project and is poised to now strategically scale up.

RESPONSE TO PRIORITIES

As outlined in the following project narrative and summarized below in *Figure 1*, CLI's proposed Scale-up project – Scaling-up the Children's Literacy Initiative's Validated Intervention to Increase Teacher Effectiveness and Raise Literacy Achievement for High-Need Students – addresses the following 2015 i3 competition Absolute and Competitive Preference Priorities:

Figure 1: Alignment between CLI's Scale-up Project and 2015 Competition Priorities

<p style="text-align: center;">Absolute Priority 1 – Improving the Effectiveness of Teachers and Principals</p> <p>CLI's proposed project will Scale-up its proven strategies for successful implementation of evidenced-based early literacy professional development, serving 400 teachers and their principals annually over five years.</p> <p>CLI's intervention, validated by AIR in 2015, will generate substantial effects on teachers' classroom environment and literacy practices which will, in turn, lead to measureable effects on average reading achievement in early elementary grades. Effects of this Scale-up project will include deeper and differentiated teacher professional knowledge about reading instruction, improved teacher literacy practices and stronger student achievement in reading.</p> <p>CLI's proposed Scale-up project will test the generalization of CLI's validated intervention with high-need students in diverse settings and contexts, including LEAs with high populations of English Language Learners (ELL).</p>
<p style="text-align: center;">Competitive Preference Priority 1 – Improving Cost-Effectiveness and Productivity</p> <p>CLI's proposed Scale-up project will improve reading achievement for approximately 49,500 high-need students over the course of the five-year implementation while substantially</p>

decreasing the total per-student costs by 10%, as compared to CLI's Validation project.

Competitive Preference Priority 2 – Enabling Broad Adoption of Effective Practices

CLI's proposed Scale-up project will test its ability to positively impact the reading performance of high-need students in four previously unserved LEAs (in CO, FL, NJ and TX) with high numbers of English Language Learners.

CLI's proposed Scale-up project will create a robust, publicly-available knowledge management system to ensure fidelity of services from CLI and to broadly disseminate CLI's validated content and implementation knowledge in an online format providing flexible, on-demand, interactive learning tools.

CLI's proposed Scale-up project will spur the organization to double the number of schools it serves in project partner LEAs, above and beyond those served by this project, and add at least two new LEAs to its service portfolio.

SIGNIFICANCE

Responding to a National Need

Only 35% of U.S fourth graders are proficient readers, and nearly a third (32%) are “below basic” (National Center for Education Statistics, 2013). Nationwide, there were more than 16 million children ages five to eight (The Annie E. Casey Foundation, 2015), which means there are potentially **more than 11 million five- to eight-year-olds in grades K-3 who do not read on grade level and must improve their reading proficiency.** The situation is particularly dire when one considers income, race and ethnicity, and ELL status, all of which lead to even more significant achievement gaps in early reading performance. *Income:* only 18% of fourth graders who are eligible for the National School Lunch Program are proficient readers, but 51% of their classmates who are not eligible (because their families have higher incomes) are

proficient. *Race & Ethnicity*: Although 46% of White fourth graders read proficiently, that proficiency level plummets to 21% for American Indian/Alaskan Natives, 20% for Hispanic students and 17% for Black students. *English Language Learners (ELL)*: only 7% of ELLs scored proficient in reading, compared to 38% of non-ELL students. Nearly seven out of every 10 (69%) ELLs were “below basic” readers.

A fundamental change is required in how early literacy professional development is provided and administered if K-3 teachers are to improve student reading proficiency.

Teacher effectiveness is one of the most significant factors affecting student achievement and can account for over 90% of the variation in literacy achievement among students from similar backgrounds (National Commission on Teaching and America’s Future, 1996). Millions of young students are in classrooms with teachers who are not prepared to teach them to read at grade-level. The dominant form of teacher professional development is not getting the job done.

Most teacher professional development offered in the U.S. today is fragmented in focus and of insufficient duration to help teachers implement new strategies (Darling-Hammond, Wei, Andree, Richardson, & Orphanos, 2009). One-time workshops, the most prevalent model for delivering professional development, have an abysmal track record for changing teacher practice and student achievement (Yoon, Duncan, Lee, Scarloss, & Shapley, 2007). Further, when teachers do attend a training or workshop, the content is likely not immediately relevant to high priority instructional needs (Bill and Melinda Gates Foundation, 2014), nor is teachers’ implementation of new strategies sufficiently supported back in the classroom for it to take root and change the trajectory of student learning (Elish-Piper & L’Allier, 2011). In a comparative study of teacher professional development in different countries, Darling-Hammond and colleagues single out the United States as lacking the high-intensity, job-embedded, collaborative

learning opportunities that are associated with positively impacting teacher practice (Darling-Hammond, Wei, Andree, Richardson, & Orphanos, 2009).

How CLI's Approach is Different

CLI's approach provides a robust alternative to the professional development commonly found in schools across the county. In contrast to fragmented, one-shot workshops that are tangential to proven, effective early literacy practices, CLI has a defined scope and sequence that focuses on the early building block skills specified by the National Reading Panel (National Institute of Child Health and Human Development, 2000) and the defined research-based instructional practices to teach those skills. Rather than leaving it to best intentions or chance to have good ideas transfer into good practice, CLI follows teachers from the training room to the classroom with tailored high-quality coaching in dosages that research and our own evaluation indicate are necessary to impact student learning (American Institutes for Research, 2015; Elish-Piper & L'Allier, 2011; Taylor, Pearson, Peterson, & Rodriguez, 2005). Instead of having teacher learning be discrete from key structures in the schools, such as grade-level meetings and leadership team meetings, CLI builds capacity to leverage and align these structures to support educators' continuous learning, accountability, and sustainability. After partnering with CLI, not only do schools have deep early literacy capacity, but districts have a cadre of instructional leaders ready to train, coach, and lead others across the district.

Specifically, CLI provides a) three years of training in a defined scope and sequence along with b) one-one-coaching by a CLI Professional Developer who c) knows the content a teacher is trying to master as well as the local context of their LEA, who d) observes how teachers implement what they have learned in the classroom and provides real-time feedback. This process enables teachers to try new approaches, to reflect, and to improve their practice. Finally,

CLI focuses on early literacy leadership development, systems and structures to build school capacity and support continuous instructional improvement.

CLI's Evidence of Success

Each year since 2008, CLI has been cited as a successful program for preparing children to be strong readers by The University of Pennsylvania's Center for High Impact Philanthropy (CHIP). They identified CLI as an "exemplar agent" in improving early literacy instruction and one of five national educational organizations in which invested dollars do the most good. CHIP's summaries have outlined four key strengths: 1) CLI's results are externally evaluated, 2) CLI programs are evidence based, 3) CLI's approach is cost effective, and 4) CLI leverages public investments already made by increasing the productivity of existing teachers.

A 2009 control-group study by OMG Center for Collaborative Learning, funded by the William Penn Foundation, showed that kindergartners and first graders in Philadelphia schools with CLI classrooms consistently outperformed peers on district literacy skill assessments. OMG also found that CLI's program helps facilitate positive relationships between and among teachers and administrators, a significant finding as schools that function as collaborative, professional learning communities invariably have better student outcomes (The OMG Center for Collaborative Learning, 2009).

In 2010, CLI's intervention was one of only 49 projects—out of nearly 1,700 applicants—to receive an i3 award in the first year of the competition. In addition, it was one of only 19 to receive a Validation award based on demonstrating evidence of prior success. In that Validation initiative, CLI worked in public schools in Chicago, Philadelphia, and Camden and Newark (NJ) and impacted more than 55,000 students over the five-year grant period. AIR conducted an

independent evaluation in K-2 classrooms in the Validation project. In its summary report, AIR noted that the “study provides evidence that an intensive PD and coaching program can be implemented with fidelity over multiple years and produce effects on teacher practice and student achievement in early elementary grades, despite common challenges...” (American Institutes for Research, 2015). U.S. Secretary of Education Arne Duncan referred to AIR findings in a February 2015 op-ed in the *Philadelphia Inquirer*: “When dozens of schools ... see jumps in students’ reading skills, it’s worth asking why. The answer, according to early results from a rigorous study, is an effort called the Children’s Literacy Initiative” (Duncan, 2015).

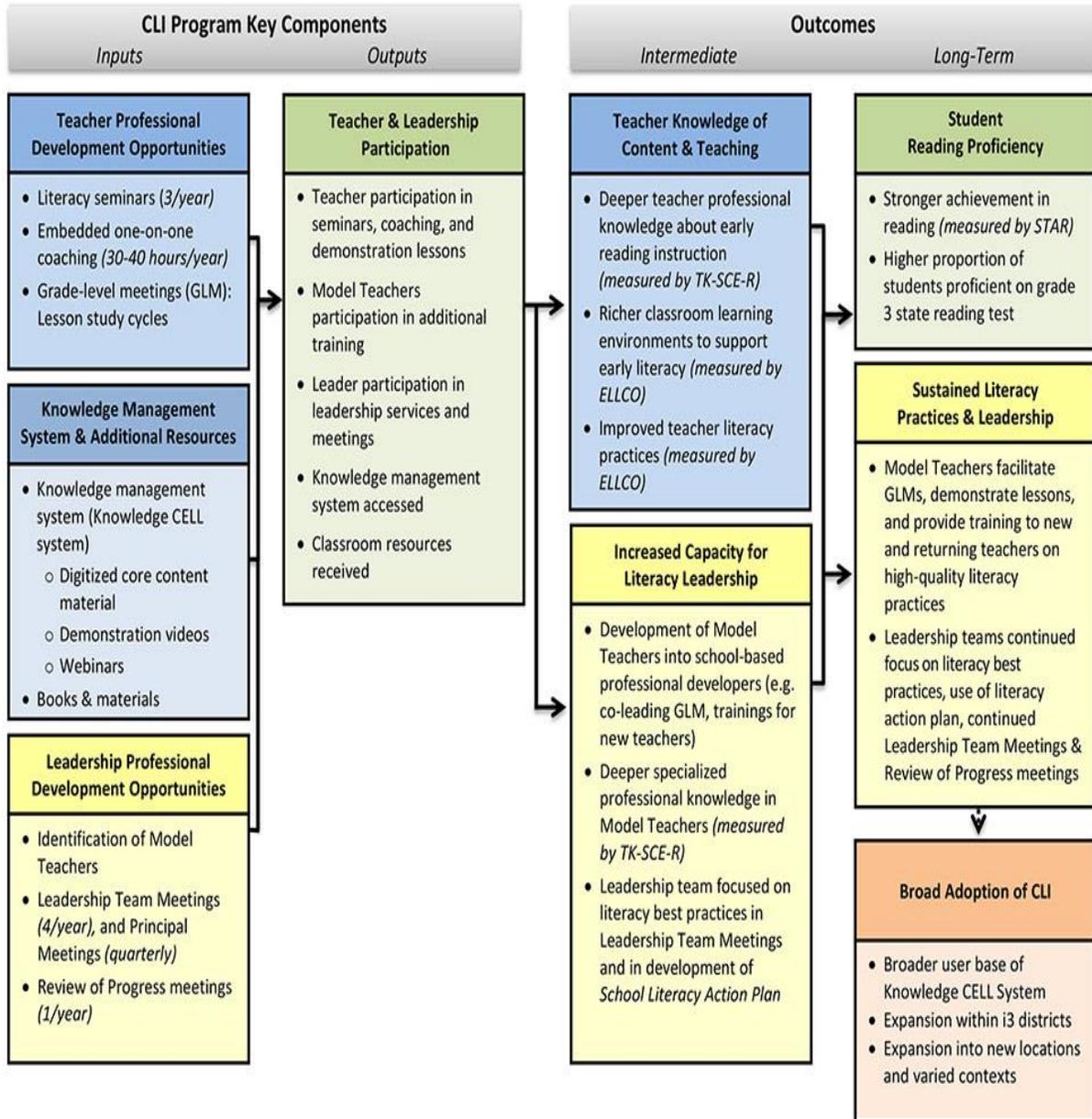
Pivoting from Validating to Scaling Up

During its 2014 fiscal year, CLI had an annual operating budget of \$8.142M and worked with nearly 250 schools in Chicago and eastward, reaching 34,750 students, the majority of which were high-need. Also in 2014, CLI launched a strategic plan that positioned the organization to move from regional to national in three years and expand impact by reaching more students (*see Appendix J*). At the heart of the plan is a commitment to replication of CLI’s validated intervention.

CLI’s Scale-up Project – Components and Impact

There are seven key components to CLI’s validated intervention which, like strands of rope, are systematically intertwined to build strength and sustainability in this proposed Scale-up project. These seven key components are represented as inputs in the following logic model (*see Figure 2*) and then detailed below:

Figure 2: CLI Scale-up Program Logic Model



1) Early Literacy Instruction Seminars: Each year, all K-3 teachers will participate in three full day seminars focused on core instructional practices that are demonstrably linked to improved student early literacy. Teachers have the opportunity to learn best practices, observe video demonstrations, and engage with each other, focused on building understanding.

2) Books and Materials: Research routinely shows that students need access to high-quality books at a range of levels and genres. Classrooms need to be inviting, with reading nooks and thoughtfully organized spaces. Books provided by CLI are engaging, culturally diverse and language appropriate. CLI outfits classrooms to be great places to learn and teach, building on evidence stressing the importance of children having large numbers of books in literacy-rich classroom environments.

3) Instructional Coaching: Even the best seminars for teachers are not enough to ensure that good ideas translate into good practice. As with students, all teachers have areas of strength and areas to strengthen. Embedded coaching allows for differentiation and real-time application.

4) Grade-Level Meetings – Lesson Study: An internal review of grade-level meetings in CLI’s Validation project found a need for a more structured lesson planning process. The Scale-up project will use grade-level meetings to create a coherent structure of focused, collaborative learning through lesson study: three sequenced meetings followed by a half-day demonstration lesson. This approach allows teachers to work together to deepen their knowledge of core instructional practices.

5) Model Teachers: Distributed leadership requires more than mere leaders; it requires distributed expertise. In CLI’s Validation project, the Model Classroom design was established to foster a deeper level of Model Teacher expertise in a range of instructional practices. However, this proved to be challenging for most Model Teachers to absorb effectively. It is one thing to become proficient in a practice, it is altogether different to have the depth of understanding to become a model for your colleagues. Based on this learning, the Scale-up project will again provide Model Teachers with additional professional development hours. However, the focus will be on each learning a specific early literacy skill within different

instructional practice areas that are developmentally appropriate and essential for their grade levels. As their expertise builds, they will increasingly take the lead in training new teachers in the core instructional practices, providing demonstration lessons, and guiding grade-level meetings. In addition, Model Teachers will play an important role in their school's Leadership Team Meetings and Reviews of Progress.

6) Leadership Team Meetings and Principal Meetings: While CLI can impact student learning with seminars, coaching, and materials, it requires school-based leadership to sustain and grow this impact. During the Validation project, CLI learned valuable lessons about improving sustainability. In addition to continuing Principal Meetings for all principals in a network, CLI will increase the focus on building instructional leadership and sustainability with quarterly meetings of instructional leadership teams. At these meetings, the principal and Model Teachers will meet to establish and implement a school early literacy action plan, track progress, and make mid-course adjustments based on performance and implementation data.

7) Reviews of Progress: In this project, each LEA has an annual Review of Progress at the end of the school year. It provides the network of participating schools the opportunity to step-back and ask critical questions of each other, examine evidence, and make improvements. Are our students on track? What are we doing that is making a difference? What do we need to do better? School teams act as critical friends with each other, sharing what is working and building transparency and accountability. Data from Reviews of Progress will help CLI continually improve its program content and delivery.

Potential for Replication of CLI's Intervention

CLI's intervention has many components that are already found in action in LEAs across the county. For example, literacy coaching is not a new concept; professional development is a

familiar undertaking in any district; grade-level meetings and leadership teams are not unusual structures in schools. CLI's value is helping in partner LEAs align these vital components to focus on the most important aspects of instructional improvement. CLI's methodology impacts the quality and alignment of how these systems, structures and practices are used, focusing on the utilization of research-based best practices.

By optimizing *existing* school structures, policies and practices and intensely focusing on building the instructional capacity of teachers and leaders, CLI has shown improvement in student early literacy outcomes. The possibility of true scale comes from a model that effectively transforms student learning outcomes in ways that existing school systems can implement and support.

CLI's Validation evaluation highlights CLI's fidelity of implementation in multiple contexts in ways that delivered improved teacher practice and positive student learning outcomes. Scaling in ways outlined in this proposal will allow CLI to partner with LEAs with particularly high concentrations of ELL students. Doing so will further extend the generalizability of CLI's intervention, creating a critical proof-point and implementation model for districts facing rapid growth of their ELL populations. Further, the implementation knowledge and resources generated and disseminated by this initiative will support these LEAs to replicate the approach in their particular contexts,

STRATEGY TO SCALE

Meeting Market Demand

Not only is there unmet *need* for stronger literacy instruction, there is also unmet *demand*. LEAs across the country are declaring that they must improve students' reading proficiency and

are positioning reading achievement as strategic priority. National-level initiatives, such as those promoted by President Obama's My Brother's Keeper, The Education Trust, and The Campaign for Grade Level Reading have amplified the focus on reading – particularly third-grade reading – as the number one predictor of school success. Over the last year, 75 school systems, some as far away as Alaska, contacted CLI about its professional development services. Most inquiries came from traditional LEAs but others were from charter school organizations, prekindergarten organizations, and peer nonprofits.

Addressing and Eliminating Barriers to Scale

In light of the demand for improved literacy instruction and outcomes, combined with its i3 validated evidence of success, CLI is confident of the market for its validated intervention to improve K-3 reading scores. To grow to meet the market demand, CLI will use proposed Scale-up dollars to address and eliminate three barrier to scale: 1) CLI's capital requirements for new market entry and expansion, 2) CLI's cost of service, and 3) CLI's tools for maintaining its fidelity of implementation. These barriers are, in part, related to the nature of CLI's validated intervention as a time- and human-capital-intensive program. CLI's intervention involves not only the training of educators in day-long seminars, but also deployment of highly-trained Professional Developers (PDs) to provide one-on-one coaching to these educators to assure their ability to implement effective literacy instruction practices in their daily work. CLI's individualized and specialized services enable teachers to significantly improve their instruction to raise student reading achievement. CLI's i3 Scale-up application now seeks funding to deliver that same level of validated intervention for broad adoption in a more cost-efficient manner.

Barrier #1: Capital Requirements for New Market Entry and Expansion

CLI i3 Scale-up Solution – Seed to Scale: With i3 Scale-up funding, CLI will immediately scale its work to reach 49,500 more students in 33 new schools in four new LEAs. CLI will establish a “hub” office in three new regions serving the 7th, 8th and 43rd largest school LEAs in the country: Broward County (FL) Public Schools, Houston (TX) Independent School District and Denver (CO) Public Schools, respectively. Each of these hubs will be a fully staffed, regional center capable of providing service in local surrounding communities. In addition, CLI will expand its East Coast presence with a new LEA: Elizabeth (NJ) Public Schools. Each of the four partner LEAs have signed a Memoranda of Understanding committing to CLI’s i3 Scale-up project (*Appendix G*).

Scale-up funding is essential to CLI rapidly establishing a presence in multiple new markets. During Validation, CLI found that i3 funding not only helped to establish on-the-ground operations in new markets, but also provided a powerful incentive to LEA and school leaders to partner with CLI, allowing CLI to make strategic choices about where CLI is likely to have the deepest and widest impact. To select partner LEAs for its i3 Scale-up expansion, CLI established five criteria (*see Figure 3*) based on student need/demographics, market size, philanthropic prospects, available human capital, and operational costs.

Figure 3: CLI’s Criteria for i3 Scale-up Partner LEAs

<i>Category</i>	<i>CLI Criteria</i>
Student Need/ Demographics	$\geq 59\%$ FRL; $\geq 50\%$ racial/ethnic minority students, and high concentrations of under-served students (e.g $\geq 10\%$ ELL).
Market Size	The extent to which there are large student populations to serve within 250 miles of the hub office, and opportunities for expansion beyond i3 work.
Philanthropic Prospects	The extent to which there is a thriving philanthropic community focused on equity in education and early literacy.
Human Capital	The extent to which CLI can find high-quality staff and coaches.

Operations	The extent to which CLI can find affordable office space, commuter flights, etc.
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For its i3 Scale-up expansion, CLI sought to partner with LEAs with high and growing populations of ELLs. The randomized controlled trial for CLI’s positive Validation results included ELL students, but the Scale-up project will specifically evaluate the impact of CLI’s intervention in LEAs with higher concentrations of ELLs. CLI formed partnerships with LEAs that have concentrations of ELL students comparable to states with the highest concentration of ELL students. In these states (Alaska, California, Colorado, Nevada, New Mexico, and Texas), 10% or more of the public school student population is comprised of ELLs (National Center for Education Statistics, 2015).

In fact, CLI’s proposed partners include LEAs from two of the top six states for English Language Learner concentration (CO and TX). In the Houston and Denver LEAs, roughly a third or more of the students are ELLs. In these contexts (*see Figure 4*), CLI seeks to reconfirm its broad effectiveness and establish generalizability in real world situations, no matter what language acquisition strategy LEAs employ (such as English Immersion, Bilingual Education and/or English as a Second Language classrooms).

Figure 4: CLI i3 Scale-up LEAs: Key Demographic & Reading Proficiency Levels

LEA <i>*Sources: LEA and State Department of Education public records. †Data from 2013/14. ‡Data from 2014/15</i>	FRL ‡	ELL ‡	White ‡	Hispanic ‡	Black ‡	Asian ‡	Other ‡	3rd Grade Reading Proficient ‡
Broward County (FL) Public Schools	62%	10%	23%	31%	40%	4%	2%	57%
Denver (CO) Public Schools	70%	38%	22%	57%	14%	3%	4%	60%

Elizabeth (NJ) Public Schools	82%	17%	8%	70%	20%	2%	0%	51%
Houston (TX) Independent School District	76%	30%	8%	62%	25%	4%	0%	67%

If the proposed project is funded, CLI would work with AIR – its independent evaluation partner for this project (*see Appendix G*) – and partner LEAs to identify possible high-need schools to be randomized.

Given its documented ability to grow beyond i3-funded projects, CLI anticipates replicating the growth experienced during its Validation project. The i3 Scale-up investment will “seed” these markets for continued growth such that the end of the five-year grant period, CLI will be serving an equal number of new, non-i3 funded schools within and adjacent to its partner LEAs.

During the five years of its Validation grant, CLI strengthened and expanded its relationships with Validation partner LEAs in Philadelphia, Chicago, Newark and Camden, (NJ), and also cultivated work in adjacent LEAs. As a result, CLI’s number of teachers coached and high-need students served – through i3 and non-i3 funded projects – more than quadrupled (*see Figure 5*).

At the same time, CLI grew both its philanthropic support and client-funded work. In 2011, CLI generated \$882,953 in philanthropic revenue to support early literacy work in the i3 cities (excluding i3 match-funding, but including general operating support). By 2015, that total grew to \$3.7M, a four-fold increase. Meanwhile, CLI’s fee-for-service revenue more than tripled from \$1.14 million in 2011 to \$3.51 million in 2015:

Figure 5: CLI Expansion in its i3 Validation Cities, 2011-2015

CLI Growth Metrics in i3 Validation Cities: Philadelphia, Chicago, Newark & Camden, NJ	2011	2015
Teachers receiving CLI coaching; i3- and non-i3 funded	333	1424
Students Served (average 25 per classroom); i3- and non-i3 funded	8,325	35,600
Philanthropic dollars raised by CLI (not including \$4.3M raised for i3 Validation match)	\$408,564	\$2,631,160
Philanthropic dollars raised by CLI for general operating support	\$474,389	\$1,039,810
Program income (school and LEA contracts)	\$1,141,813	\$3,151,480

Seeding its work in these LEAs allowed CLI to build important relationships and show the work in action, creating the right conditions for growth. This momentum was accomplished during a significant economic recession. Amid the heightened national attention placed on the importance of reading by third-grade and an improving economic outlook, CLI anticipates that it will double the number of schools it serves by the end of the grant period, as well as add two new LEAs to its service portfolio.

Barrier #2: Cost of Service

CLI i3 Scale-up Solution – Improve Cost Effectiveness and Efficiency: LEAs that most need CLI’s intervention – those that serve greater percentages of low-income, high-need students – tend to be the least positioned to be able to pay for it amid competing financial demands. These LEAs tend to spend less of their budget on improving teacher practice through professional development than LEAs serving more affluent student populations (Johnson, Kraft & Papay, 2012). Reducing CLI’s cost of service is not only a matter of scaling strategy, but also a matter

of equity – to make CLI’s validated intervention widely available to all LEAs who seek to improve their students’ reading achievement.

CLI made important strides in optimizing its cost effectiveness during its i3 Validation project. Through important investments in back office accounting, project management and distribution systems, CLI reduced its overall per pupil cost of service by 10%, from \$419 per student for the Validation project to \$378 per student for the proposed Scale-up project. The reduced per pupil cost in this proposal (\$378) includes more than \$1.4 million in one-time expenditures to open three new hubs, plus investments in developing the systems, structures and knowledge management system necessary to maintain and improve the fidelity of implementation as CLI expands its service footprint. Given its history of expanding once a hub is established and the phasing out of start-up costs, CLI anticipates being able to reduce its overall per pupil cost further. At the close of the i3 Scale-up grant in 2020, CLI expects to reduce the per student costs by an additional 5% to \$359 per pupil. This estimate includes ongoing costs associated with replacing IT, staff turnover, and continuous improvements to the proposed knowledge management system.

In this proposed project, CLI also made modifications to increase impact. Based on i3 Validation lessons learned, CLI’s Scale-up project improves the distribution of coaching hours delivered to teachers, the most expensive resource in the program model, so that more teachers would receive a greater dosage of coaching. In CLI’s Validation grant, Model Classroom teachers received significantly more hours of coaching than their grade-level colleagues – 175 hours compared to 90 hours, over the course of the initiative. CLI’s analysis of the Validation results indicates that while Model Classroom teachers had slightly better gains in student learning than their colleagues, the “dosage” of coaching hours was overly skewed to Model

Classroom teachers. Building on AIR’s findings of a “pattern of increased effects with increased CLI program participation” (American Institutes for Research, 2015), CLI flattened the distribution of coaching hours so more teachers would receive a greater dosage of coaching, increasing colleague teacher coaching by 17% to 105 hours over the course of the initiative, *without* increasing overall costs. This redistribution of hours did not reduce the cost of service, but CLI expects it will increase program effectiveness and thus its efficiency.

In addition, CLI also increased the number of coaching hours allocated to small group settings, such as grade-level meetings and Leadership Team Meetings from 18 hours in the Validation project, to 81 hours in Scale-up. The advantages of this change are two-fold. First, it supports the development of professional learning communities focused on continuously making the connections between instruction and student learning (McLaughlin & Zarrow, 2001), and provides Model Teachers with a structured and supported arena in which to exercise distributed instructional leadership. Second, it provides a more cost-effective approach to coaching: one hour of coaching impacts all teachers in the small group. The combination of increased one-on-one coaching for more teachers with additional coaching in small group settings yields moderately lower overall coaching costs with a more impactful coaching mix.

Barrier #3: Fidelity of Implementation

CLI i3 Scale-up Solution – Embed in Local Context, Provide Access to Codified Core

Content and Processes, and Increase Capacity to Train and Support Employees: CLI’s i3

Validation evaluation showed that it was able to implement the CLI program with fidelity across sites, even when taking into account high teacher and student turnover and politically volatile contexts, such as the superintendent turnover in each participating LEA. Yet, as CLI’s size and reach increases, so does its risk of diffused impact due to inconsistent program delivery.

To mitigate these risks during its i3 Scale-up project, CLI will: 1) Embed itself into the local contexts of the LEAs it will serve to understand how its intervention fits in with each LEA and gain buy-in from key stakeholders. Without understanding the local context and gaining buy-in, the intervention is much more likely to fail. (Castro, Barrera, & Martinez, 2004; Hubbard, Mehan, & Stein, 2006; Wandersman et al., 2008). 2) Provide CLI staff, i3 partner LEA educators, and the public, access to codified content and implementation processes in a knowledge management system to make CLI's approach more effective and replicable. 3) Expand CLI's capacity to meet the increased demands for training and support of its employees; this is critical as an organization brings on new employees during periods of growth (World Health Organization, ExpandNet, 2010; Bodilly, Keltner, Purnell, Reichardt, & Schuyler, 1998; Elias, Zins, Graczyk, & Weissberg, 2003).

Embed in Local Context

In each i3 Scale-up location, the success of CLI's intervention hinges on clear communication with and buy-in from local educators at the LEA and school level. During its i3 Validation, CLI developed partnerships with new LEAs to meet the needs of the local contexts which allowed for implementation with maximum fidelity. This occurred because, as CLI entered each new market, CLI staff and leadership invested time in gauging the local education market, not only discovering the needs of its partner LEAs and schools, but also cultivating local universities, non-profit organizations, foundations, educators, administrators, teachers, and families. By embedding itself in the local contexts, CLI creates the condition for fidelity of implementation of its intervention. CLI uses these relationships to guide its planning, expectations and specific goals for local work and to forge strategic partnerships in established markets. In Chicago, for example, CLI works with universities and public initiatives such as

Chicago Literacy Alliance and THRIVE Chicago, a citywide collaborative to prepare Chicago's youth for success. These collaborative relationships promote CLI's meaningful engagement in public education and enhance CLI's role as a local educational leader. CLI also presents workshops at North Central College's annual Accredited Colleges of Illinois teacher leadership conference. As a result, CLI has emerged as a thought leader and a resource to the region's education community.

For its i3 Scale-up project, CLI will immerse itself in the local educational environment surrounding each partner LEA and invest time and resources to develop collaborative local partnerships. CLI's Executive Director, Deputy Executive Director and a veteran Regional Manager (RM) will travel to each market to establish the parameters of CLI's partnership with the local partner LEA, build trust and rapport, recruit local talent and begin exploring the local philanthropic scene. CLI will hire a local RM for three of four new hubs (Broward County, Denver and Houston). Schools in Elizabeth (NJ) will be served by an existing RM and a to-be-hired Associate Regional Manager (ARM), funded by this project. RMs will then select, hire and contract with local personnel to deliver and manage CLI services. The local RM will coordinate all work within the LEA, including partnering with principals and LEA level staff. CLI will tap its existing expertise to build local expertise and understanding of the local context to strengthen fidelity of project implementation.

Provide Access to Codified Core Content and Processes

CLI will use the i3 Scale-up grant to hone its own knowledge management system (KMS) for use by educators and its own staff and Professional Developer contractors. As CLI expands to more locations with more employees and consultants, having access to and use of codified content and implementation knowledge becomes increasingly important (Alavi & Leidner, 2001;

Lee & Hong, 2002; Tiwana, 2000). Through its i3 Validation work, CLI developed a great deal of the content that enabled our successful implementation across multiple sites. Through Scale-up, CLI will organize, augment and digitize this work into a KMS. This KMS will provide teachers, coaches, and administrators the support they need to implement effectively. This web-based system will not only benefit the more than 400 educators annually participating in the i3 Scale-up project but will also be disseminated and freely accessible to the public nationwide.

CLI has branded its proposed online knowledge management system as CLI's Early Literacy Leadership System, or the Knowledge CELL System. CLI will develop the Knowledge CELL System in modular components designed to support individualized adult learning, beginning in Q1 FY16. The Knowledge CELL System will launch in Q4 FY16, with evaluation and refinement, and additional content creation slated to occur FY17 through FY20.

CLI's goal is that the Knowledge CELL System serves 30,000 unique visitors and 120,000 total visits by 2020; this assumes 40% year-over-year growth in KMS usage after its launch. Content will focus on the five core instructional practices identified by the National Reading Panel and validated through our prior implementation: Guided Reading, Intentional Read Aloud, Shared Reading & Guided Writing, Reader's Workshop and Writer's Workshop. To strengthen participants' learning and sustain improvement to literacy instruction and student learning, CLI will also include content centered on the project's collaborative learning structures: grade-level meetings / demonstration lessons, Leadership Teams Meetings and Reviews of Progress.

Each Knowledge CELL module will provide users with content supporting three different ways to learn and interact with content: they can read about it, they can see it in action, and they can talk about it (*see Figure 6*).

Figure 6: CLI’s Knowledge CELL System Content and Modes of Interaction

 Read It	 See It	 Talk About It
Field Implementation Guides Training Manuals Blog Posts FAQs Templates Examples (e.g. lesson plans)	Demonstration videos User generated content linked through CLI’s Pinterest and Instagram sites (e.g. lesson plans, anchor charts, etc.)	Curated and moderated discussion group Live Webinar Series

During its i3 Scale-up project, CLI will produce field guides and related collateral for each of the five core instructional practices and three collaborative learning structures, plus 25 professional quality videos and 18 live webinars.

Knowledge CELL content will be tiered to the participants’ roles. For example, a teacher and a principal may both want to see examples of a core literacy instruction practice in action, but a teacher may want to go deeper into how to plan for the practice, while a principal may want to have examples of what to “look for” while doing a classroom walkthrough.

CLI will use the Knowledge CELL System to deliver and disseminate the information and content about core instructional practices and collaborative learning structures employed to deliver results in its i3 Validation (*see Figure 7*).

Figure 7: Knowledge CELL System Content for Specific Users

	Core Instructional Practices					Collaborative Learning Structures		
	Guided Reading	Instructional Read Aloud	Shared Reading & Guided Writing	Reader's Workshop	Writer's Workshop	Grade Level Meetings	Leadership Team Meetings	Review of Progress
Teachers								
Principals								
Coaches								

Read It
 See It
 Talk About It

CLI’s Knowledge CELL System will strengthen program fidelity by supporting staff and Professional Developer contractors as they deliver services. CLI believes making the system available to participating educators in partner LEAs will not only deliver needed information to these participants, but also help CLI cultivate the critical buy-in needed to support positive changes in instruction.

Increase Capacity to Train and Support Employees

For its proposed i3 Scale-up project, CLI will hire, train and support approximately 10 new full-time staff members based in CLI’s three i3 hub offices and its Philadelphia headquarters office. In addition, CLI will screen, contract with and support approximately 30 new PDs to provide coaching and training to teachers within the four i3 Scale-up LEAs. As the primary point of contact with teachers, PDs have an essential role in maintaining the fidelity of implementation and must be fully trained and supported to be effective. CLI’s i3 Scale-up project will require a significant investment in training and mentoring to get this done.

CLI will use i3 Scale-up funding to train and support its new employees and PDs in the same manner it does to build the effectiveness of teachers: with orientation and training that is backed by ongoing coaching to support new employees and PDs to use CLI's research-based best practices.

CLI will use an internal training model that allows it to leverage current field staff's deep knowledge and experience implementing CLI's validated model. The Scale-up staff development will happen in two phases. In Phase 1, veteran CLI employees will hire, orient and mentor local talent hired in each hub market to fill key launch roles for Regional Management and External Relations. In Phase 2, trained, local CLI staff in each market will begin contracting with and managing PDs. This mentoring role is not new to CLI, but a standard part of CLI's onboarding of new PDs and staff.

New CLI RMs and other field-based staff will be trained and supported via an extensive orientation, training webinars, mentoring/coaching by veteran CLI staff, and weekly Skype meetings with other CLI Scale-up staff and the Deputy Executive Director. In addition, new CLI RMs will travel to CLI's Philadelphia HQ to take part in organization-wide meetings, Reviews of Progress and professional development.

For the proposed i3 Scale-up project, new PDs will be screened by CLI's Philadelphia HQ, and then interviewed and hired by veteran and new RM in the hub markets. A multi-day orientation, held in the hub markets, will introduce the PDs to CLI, its core components, business documents and processes, and human resource policies. The majority of the orientation focuses on instructional best practices. Finally, a substantial amount of the orientation will be a "Coaching Camp" focused on effective coaching. Once deployed in the LEA's schools, each PD will, at minimum, check-in weekly with field leaders. CLI's i3 Scale-up project provides that

each CLI PD will receive job-embedded coaching sessions with experienced RMs. Each PD sets professional goals that are supported by the RM and align to CLI's program implementation benchmarks, allowing for regular checks of fidelity. PDs who need extra support also can be coached virtually by a veteran CLI PD operating in established CLI markets.

In addition, CLI PDs will attend a total of 10 PD Collaboration Days each project year. During the five-hour PD Collaboration Days, each PD has the opportunity to hone their teaching and coaching skills in a classroom environment with the support of their peers and their RM and collectively review project details and processes, trouble-shooting any challenges. In the first two years of the project, experienced CLI staff will travel to the new markets to lead the PD Collaboration Day trainings.

By leveraging extensive field based knowledge and expertise and building systems for ongoing support and learning, CLI will assure the fidelity of implementation. Additionally, the creation of the hub structure will allow CLI to cultivate an extensive cadre of trainers in key geographical areas. This will allow CLI to reduce ongoing training costs to sustain and grow the region while maintaining the fidelity of its validated intervention.

Dissemination Strategies

CLI will disseminate information about its Scale-up project through a tight combination of:

- a) outreach to partner and adjacent LEAs in the i3 Scale-up "hub" markets to demonstrate (via classroom visits) the impact of the intervention and grow the number of schools receiving CLI's direct services,
- b) online promotion of the Knowledge CELL System as the free knowledge management system behind CLI's validated system to improve teacher effectiveness and student reading achievement.
- c) continuing to present at regional and national-level conferences targeting the elementary education community, such as the annual events presented by Learning

Forward (teacher professional development), AASA (K-12 school superintendents), The National Association for Elementary School Principals, and associations such as the National School Boards Association, or the Council of Urban Boards of Education, and d) ongoing content marketing via social media platforms, blog/article placement in trade and mass media, and targeted journal article placement. In particular, CLI will seek to present in educator forums centered on the needs of ELLs.

In addition, CLI and its evaluation partner AIR will seek to have research reports about CLI's i3 Scale-up project published in peer-reviewed journals, in order to have its intervention accepted into the U.S. Department of Education's What Works Clearinghouse.

CLI will take a three-pronged approach to promote the use of the Knowledge CELL System and disseminate information about CLI's Scale-up project. First, CLI will leverage its database of more than 5,000 past and current CLI-served educators to activate participation. Second, CLI will leverage its social media platforms (Twitter, LinkedIn, Facebook, Pinterest and website blogs) to market its Knowledge CELL System tools to the education field. CLI's social media growth has been exponential since hiring a Marketing Director in 2014, with Facebook posts reaching 99,729 people and website generating 114,000 views per year. Finally, CLI will reach out to strategic partners with broad audiences of educators, such as Teach for America, Success for All, and a range of charter management organizations to help with marketing efforts to their stakeholders. CLI's goal is that by 2020 the Knowledge CELL System serves 30,000 unique visitors for 120,000 total visits annually, serving as a powerful ambassador for and disseminator of CLI's validated approach to improving teacher effectiveness and student literacy achievement.

QUALITY OF THE PROJECT DESIGN AND MANAGEMENT PLAN

Project Goal, Objectives and Outcomes

CLI's will measure its impact by its ability to achieve, on the timeline outlined, the following Scale-up project goal, objectives and outcomes (see Figure 8):

Figure 8: Scale-up Project Goal, Objectives and Outcomes

<u><i>Project Goal</i></u>	
<p>By improving the effectiveness of teachers over the five-year implementation of CLI's proposed Scale-up project, by 2020 approximately 49,500 high-need students will show, on average and at a statistically significant level, greater reading achievement compared to control schools as measured by STAR and third-grade reading tests.</p>	
<u><i>Project Objectives</i></u>	<u><i>Project Outcomes</i></u>
<p>Implement CLI's proven intervention in four, previously unserved LEAs serving higher-than-average portions of high-need students and ELLs.</p>	<p>1) Approximately 400 teachers in 33 schools will annually improve their literacy instruction practices. 2) Approximately 9,900 high-need students will annually improve their reading performance. 3) Provide all partner LEA schools in the random control trial with high-impact services – training, coaching and books/materials – during the three-year treatment (Q3 2016 through Q3 2019).</p>
<p>Replicate CLI's validated intervention by cost-effectively scaling up in previously unserved LEAs.</p>	<p>1) Decrease the total per student cost in the Scale-up project by 10% as compared to CLI's Validation project. 2) Develop, launch (by Q2 2016) and operate a CLI hub to support successful project implementation with Broward County (FL) Public Schools and eventually with surrounding LEAs. 2) Develop, launch (by Q2 2016) and operate a CLI hub to support successful project implementation with Denver (CO) Public Schools and eventually with surrounding LEAs. 3) Develop, launch (by Q2 2016) and operate a CLI hub to support successful project implementation with Houston (TX) Independent School District and, eventually with surrounding LEAs. 4) By Q2 2016, leverage and strengthen existing CLI HQ (PA) human capital, structures and systems to support successful project implementation with Elizabeth (NJ) Public Schools.</p>

Replicate CLI’s validated intervention by scaling up, through broad adoption, in previously unserved LEAs with diverse settings and contexts.	1) By 2020, test and ultimately confirm CLI’s ability to positively impact the early literacy performance of high-need students in LEAs with high numbers of ELLs. 2) By 2020, create, launch and sustain CLI Knowledge CELL System, serving 30,000 unique visitors for 120,000 total visits in 2020. 3) By 2020, double the number of schools CLI serves in project partner LEAs and add two new LEAs to its service portfolio.
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CLI’s proposed Scale-up project consists of six months of start-up (Year One), three years of treatment (Years Two, Three and Four) followed by one year of sustaining work (Year Five) (see Figure 9). CLI considers each of the components to be critical inputs that will lead to the desired outcomes. Therefore, monitoring and tracking of these inputs provides a useful approach to benchmarking the fidelity of implementation for each project year.

Figure 9: Scope of Services for CLI’s 5 Year Scale-up Project

	FY16	FY17	FY18	FY19	FY20
Seminars	None	112	112	112	None
Coaching	None	14,820 hrs. (approx. 35 hrs./teacher)	19,520 hrs. (approx. 40 hrs./teacher)	15,740 hrs. (approx. 30 hrs./teacher)	170 hrs. (5 hrs./school)
Grade Level Meetings (GLM)	102 hrs. (3 hrs. / school)	2,176 hrs. (64 hrs. / school)	2,040 hrs. (60 hrs. / school)	2,040 hrs. (60 hrs. / school)	None
Leadership Team Meetings (LTM)	None	136 (4 LTM / School)	136 (4 LTM / School)	136 (4 LTM / School)	136 (4 LTM / School)

Principal Meetings	None	20 (4/LEA)	20 (4/LEA)	20 (4/LEA)	15 (3/LEA)
Reviews of Progress (ROPs)	None	5 (1/LEA)	5 (1/LEA)	5 (1/LEA)	5 (1/LEA)
Materials	No Materials	\$340,000 (\$10,000 / School)	\$244,800 (\$7,200 / School)	\$170,800 (\$5,000 / School)	No Materials

The Knowledge CELL System also has clearly defined implementation benchmarks as represented in *Figure 10*:

Content	FY16				FY17	FY18	FY19	FY20
	Q1	Q2	Q3	Q4				
Organize Current Content	•							
Adapt Current Content	•	•	•		•	•		
New Content Creation	•	•	•	•	•	•	•	•
- Videos		• (2)	• (2)	• (2)	• (12)	• (8)	• (1)	
- Webinars		• (1)	• (1)	• (1)	• (4)	• (4)	• (4)	• (3)
Differentiated Content				•	•	•	•	•
Refine (Based On Feedback)				•	•	•	•	•
Infrastructure	FY16				FY17	FY18	FY19	FY20
	Q1	Q2	Q3	Q4				
Content Database								
Identify Entities, Relationships, Attributes	•	•						
Populate with Current Content			•	•				
Populate with New Content				•	•	•	•	•
Website								
Wireframe	•							
UX Design for Interactive Comment Space	•							
Design, Code & Test		•	•					
Launch				•				
Evaluate & Refine				•	•	•	•	•

Leveraging Operating and Financial Models Developed during i3 Validation

CLI's i3 Validation project was implemented on time and on budget. To that end, CLI is knowledgeable about federal compliance, accountability and reporting, as well as best practices in governance and fiscal responsibility, as recognized by a consistent, four-star rating from Charity Navigator and unmodified audit opinions. Additionally, the organization strengthened processes related to content development and service delivery, finance, fundraising and operations, including human resources. CLI's proposed Scale-up project leverages the expertise gained from the Validation project *and* the infrastructure improvements that were developed under that award to increase scale and impact.

To address the challenges that scaling up will bring, CLI has revisited efforts made during the Validation grant and developed a Scale-up management strategy focused on the following core elements: 1) project leadership, staffing and teams that foster feedback, 2) systems to increase operational efficiency, and 3) long-term resource development. This strategy ensures the Scale-up project can effectively achieve stated objectives on time and within budget.

Project Leadership, Staffing and Teams that Foster Feedback

In preparation for this project, CLI analyzed its staffing and positioned the most qualified and experienced professionals to lead key elements of CLI's work. Veteran CLI leaders, operating on a national level, will manage the critical elements of its proposed Scale-up project:

CLI Executive Director Joel Zarrow, PhD, will lead all aspects of the Scale-up project, as he currently does CLI's Validation grant. Dr. Zarrow joined CLI in 2014, and since his arrival, has overseen the approval of a comprehensive growth strategy for CLI focusing on geographic expansion and development of digital resources to improve distribution of high-value content. Having earned his doctorate at Stanford University, Dr. Zarrow has dedicated his nearly 20-year career to improving the quality of education in public urban schools and closing the achievement

gaps found there. Prior to joining CLI, he launched and led the New Jersey Department of Education's efforts to affect an academic turnaround in 220 of the state's lowest-performing schools. Dr. Zarrow has worked with a wide range of non-profit organizations committed to improving urban public schools and districts, and has worked in the private sector as a management consultant, working with global Fortune 1000 firms on leadership and performance issues.

Caryn Henning, Director of Program Design and Professional Development, will serve as Co-Project Director. Ms. Henning oversees CLI training and coaching, the orientation and ongoing training of CLI PDs, and all data analysis. A former teacher with 14 years of experience at CLI, Ms. Henning began with CLI in 2002 as a Professional Development consultant and, in 2008, became Regional Manager and oversaw CLI's i3 Validation project sites in New Jersey.

Ifeoma Ajuba-Ugorji, Director of Operations, will serve as Co-Project Director. Ms. Ajuba-Ugorji creates and oversees systems and processes to bring efficiencies and transparency to a complex operation. She supervises staff responsible for project logistics and management, contracting with Professional Development consultants, and the ordering, shipping and receiving of books and materials. With more than seven years at CLI, she was instrumental in administration of the i3 Validation grant, working closely with both project management staff and finance to ensure timely service delivery.

Given the emphasis in Scale-up on both high-quality operations (internal) and content (external), CLI strategically selected the Project Co-Directors and believes that their teaming is essential for the highest-quality project implementation and sustainability.

In tandem with Scale-up project leadership, about 40% of CLI current FTE workforce will be highly-engaged in the Scale-up project during the five-year implementation (*see Figure 11*;

Appendix F for resumes of key project personnel). These individuals, many of whom were CLI employees during the Validation grant, are all top-notch professionals, with advanced degrees in education or in their respective content area.

Figure 11: Key Personnel for Scale-up Grant Implementation

Position	Function
Joel Zarrow, Ph.D., <i>Executive Director</i>	Joined CLI in 2014. Leads CLI, serves as chief representative for CLI on all national growth activities. <i>No funds are requested for Dr. Zarrow</i>
Ifeoma Ajuba-Ugorji, MBA, <i>Director of Operations</i>	Joined CLI in 2008. Co-Project Leader (Internal) responsible for operational effectiveness, Project Manager supervision, production/resource delivery; works closely with Finance.
Caryn Henning, <i>Director of Program Design & Professional Development</i>	Joined CLI in 2006. Co-Project Leader (Field) provides oversight of program training and coaching delivery at the national level and supervises all Regional Managers.
Frank Grossman, Ph.D., <i>Deputy Executive Director & Chief Academic Officer</i>	Joined CLI in 2015. Provides leadership to staff for development of instructional content and improvement to program design.
Pat Federman, M.Ed., <i>Senior Regional Manager</i>	Co-Founded CLI in 1988. Provides training and mentoring to current and new Regional Managers.
Michele Coulombe, MA, <i>Manager of Content Development</i>	Joined CLI in 2005. Creates professional learning, training program, curriculum content to meet best practices standards.
Jen Weikert, MA, Certificate in Fundraising, <i>Director of External Relations</i>	Joined CLI in 2009. Responsible for development of a balance portfolio of philanthropic revenue, ensures proper reporting and accountability to U.S. Dept. of Ed.
Brooke DiLeone, Ph.D., <i>Research & Evaluation Manager</i>	Joined CLI in 2015. Responsible for research/analysis, serves as liaison to project’s independent evaluator.
Cynthia Roberts, MBA, <i>Director of Finance & Facilities</i>	Joined CLI in 2012. Manages the financial operation of the grant and leads CLI’s financial team.
Christopher Kretschman, BS, CMA, <i>Accounting Manager</i>	Joined CLI in 2007. Works with all project teams to ensure efficient billing procedures and systems.

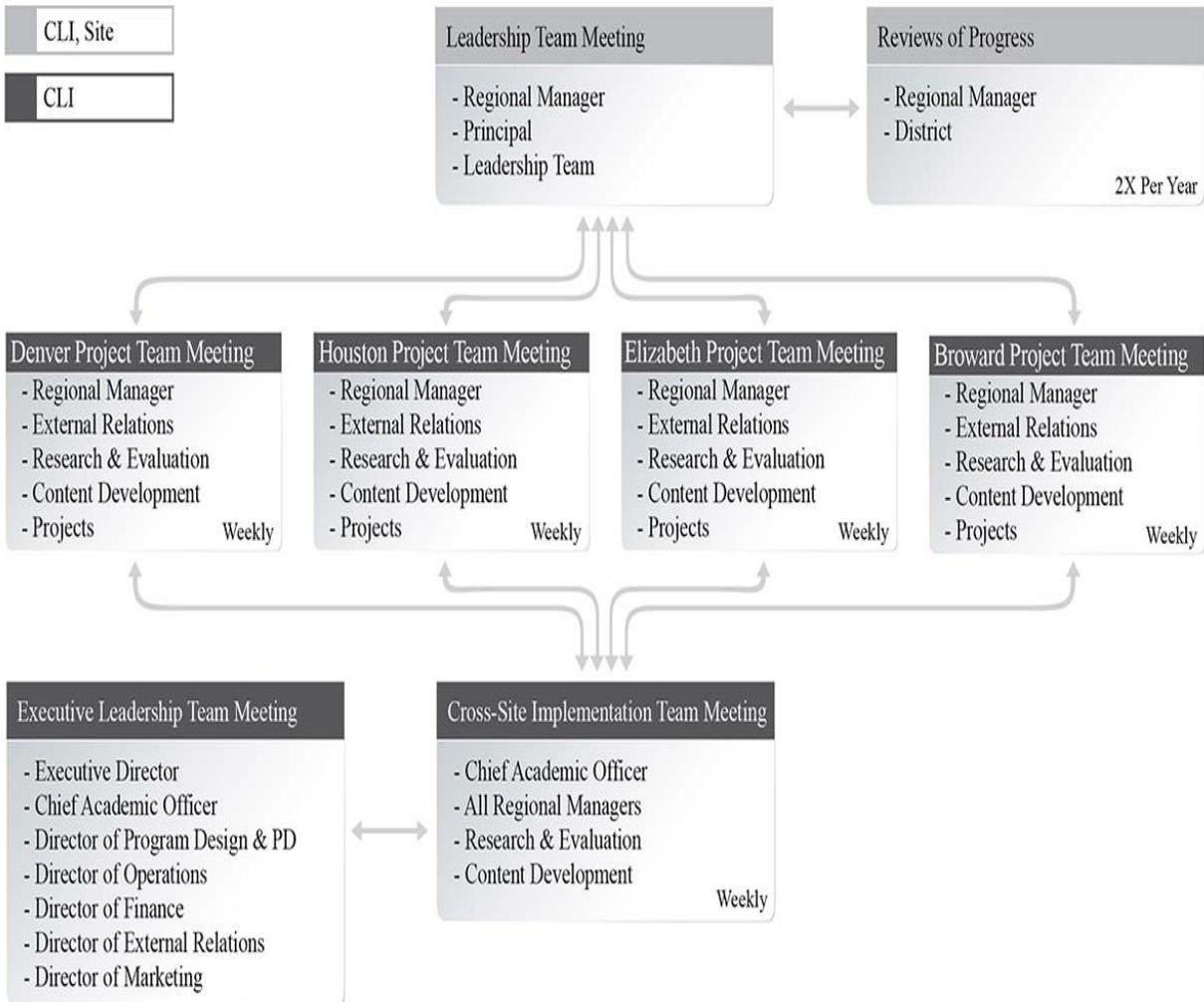
George Echenhofer, Microsoft Certified Systems Engineer, <i>Senior Technology Manager</i>	Joined CLI in 2012. Responsible for efficiency of CLI's information technology and communications systems as well as advising internal teams for design and implementation of new technologies.
Mahan-Jiwan Khalsa, MS, SPHR, <i>Human Resources Manager</i>	Joined CLI in 2008. Provides all HR support, including recruiting, hiring, on-boarding.
Mike Jones, BFA, <i>Director of Marketing</i>	Joined CLI in 2014. Responsible for production of all CLI print and online materials.
To be hired	
<i>Regional Managers (3) for Denver, Broward County, Houston</i>	Within respective LEA, oversees quality and coordination of service delivery, partnerships with LEA and community, coaches principals, supervises local PDs.
<i>Associate Regional Manager for Elizabeth (NJ)</i>	Involved in all aspects of implementing service in Elizabeth (NJ)
<i>i3 Project Manager</i>	Manages day-to-day operations of i3 project
<i>Project/Event Coordinators (4)</i>	Supports project manager by ensuring on-time delivery of books/materials and scheduling of meetings/events.

CLI's FY16 budget covers salaries for current staff to dedicate time to the proposed project. New positions will be filled at varying times during the five-year project, and FTEs will fluctuate depending on the date of hire and amount of time dedicated to the Scale-up project.

Each area of focus within CLI's Scale-up project has a dedicated team with the necessary expertise needed to deliver on all project outcomes. There is much intentional overlap of the members in various project teams to ensure successful cross departmental communication and feedback. These CLI teams will be responsible for analyzing, responding to and then communicating key project performance metrics as well any project challenges and solutions to CLI and LEA stakeholders. These management teams will receive data from the hub-based project teams, as well as the LEA-level Reviews of Progress, which are ultimately fed by data

from school-level Leadership Team Meetings. As shown in *Figure 12*, CLI's i3 Scale-up teams will operate bi-directional feedback loops in a communications/decision-making structure that CLI developed and successfully employed during i3 Validation.

Figure 12: CLI's Communication Structure for Scale-up Grant



CLI i3 Executive Management Team: This team is comprised of the leaders from every team and department involved in the i3 Scale-up initiative. The Executive Management Team is responsible for oversight of all aspects of overall project performance. The team meets monthly

to review key performance indicators related to project implementation, operations, evaluation and financials.

Site Implementation Teams: Each intervention LEA is assigned a Site Implementation Team responsible for implementing the intervention in ways that yield the intended impact. Each team is led by a RM responsible for the relationship with the LEA and site leadership. The RMs are also involved in all aspects of our leadership development work, including the Principal Meetings, Leadership Team Meetings and Reviews of Progress. The RM manages a corps of PDs who focus on teacher-level instructional improvement, including training, coaching and grade-level meeting support. Finally, each team is assigned a Project Manager who is responsible for ensuring a tight and fluid connection between the Site Implementation Team and the other teams involved in implementation, including finance, human resources, operations and content development. This team meets weekly to focus on tactical issues regarding project implementation, scheduling and service delivery.

CLI Cross-Site Implementation Team: This team is comprised of the leaders from each Site Implementation Team, as well as CLI's Deputy Executive Director & Chief Academic Officer along with other senior leaders. This team focuses on the fidelity of implementation across intervention sites and reviews implementation and performance data to monitor progress, trouble-shoot issues and make near-term program improvements. This team creates the opportunity for our key implementation leaders to learn from and with each other. This team meets weekly.

Content Development Team: This team is led by the Co-Director Project (Internal) and the Deputy Executive Director & Chief Academic Officer and is responsible for developing and

adapting all internal and external content. This team develops all scripts, presentations, and content for trainings and seminars. The team also develops staff materials needed for PD Collaboration days in response to LEA needs.

Systems to Increase Operational Efficiency

To prepare for the i3 Validation grant, CLI made a large organizational investment in customization of our Salesforce Customer Relationship Management (CRM) to enable consistent project management and reporting. Over the life of the grant, CLI has made incremental process changes to improve data management.

In January 2014, CLI successfully implemented full integration of Microsoft Dynamics SL, an enterprise resource planning (ERP) software with Salesforce CRM and improved Informatica support of Salesforce. This process provides critical support for operations and execution of our geographic expansion. Costing for the next three years has been entered in Salesforce; and organization data has been segmented into fundamental areas, such as product type, geographic location, CLI hub city, and CLI department. The data segmentation assists in pricing and project management within different school districts to monitor variances in market costs.

Salesforce integration enabled CLI's accounting and finance departments to produce financial information that's relevant and reliable. The improved quality of CLI's financial reporting has given the CLI staff a key tool for managing the organization's infrastructure more efficiently. It also made CLI's finances more transparent – a critical performance factor for CLI's board and funders.

Additionally, CLI took important steps to refine and stabilize project management through Supportal, which manages contractual relationships and coaching fulfillment with 75+ PDs in various cities.

Again, the integration of systems and business practices allows for greater efficiency of operation. For example, the addition of an inventory scanning feature into CLI's Salesforce database resulted in more accurate tracking of the tens of thousands of children's books that CLI ships to classrooms each year.

Long-Term Resource Development

When it comes to LEA and philanthropic resource development, the i3 Validation grant acted as a catalyst to secure commitments from new philanthropic funders – like the Kellogg Foundation and Target. CLI's positive results also attracted additional fee-for-service partnerships with LEAs, like Passaic City (NJ) School District and St. Louis (MO) Public Schools.

As stated on the Memoranda of Understanding (*see Appendix G*), each proposed Scale-up LEA has agreed to provide \$10,000 per year for each intervention schools for each of the three years of treatment. These “buy-in” dollars would go toward proposed services at invention schools, but only represent a small fraction of the total intervention costs.

At the time of this application, CLI has secured \$205,000 in private sector match commitments, including \$25,000 from long-time funding Target for “scaling (CLI's) reach across regions and the county” (*see letter of support from Target in Appendix G*), as well as \$180,000 from three individuals donors, all with a history of investing in CLI. Since broad adoption is at the heart of CLI's current strategic plan, (*see Appendix J*), CLI will prepare, by

August 30, 2015, several asks totaling \$300,000 targeted to long-time CLI supporters. If awarded a Scale-up grant, CLI will seek funder permission to allocate any awarded dollars from these private sector sources toward the required 5% match.

Upon the successful award of the i3 Scale-up grant, CLI anticipates it will meet or exceed the federal i3 award milestones for match funding given its track record of fundraising.

QUALITY OF THE PROJECT EVALUATION

American Institutes for Research (AIR) will be the independent evaluator for the CLI i3 Scale-up grant. AIR currently serves as the evaluator for 14 i3 grants (six Validation grants and eight Development grants) and was the evaluator for CLI's i3 Validation grant. These grants are part of AIR's portfolio of evaluation developed over 70 years since the company was founded in 1946. The evaluation of the CLI i3 Scale-up grant includes a multi-site randomized controlled trial (RCT), which AIR has applied in the evaluation of seven i3 grants, as well as numerous Institute of Education Sciences (IES) contracts.

This evaluation will be informed by AIR's substantive knowledge of professional development in early reading, including evaluations for IES and prior evaluations for CLI. AIR's evaluation will also meet the rigorous What Works Clearinghouse standards for the credibility of intervention effectiveness results. Specifically, the evaluation is an RCT, baseline group equivalence will be established, and we do not expect differential attrition by group (i.e., control vs. treatment) (U.S. Department of Education, What Works Clearinghouse, 2013).

The CLI Scale-up evaluation seeks to address the following confirmatory questions about the impact of the CLI program on student achievement and teacher practice:

1) What is the impact of the CLI program on kindergarten through third-grade students' reading achievement after schools have received one, two, and three years of CLI services?

2) What is the impact of the CLI program on classroom environments and teachers' literacy practices after one and two years of participation in CLI?

The evaluation also seeks to answer the following research questions related to the fidelity of program implementation and the sustainability of CLI structures within the school:

3) To what extent is the CLI program implemented with fidelity to the proposed model?

4) To what extent are CLI structures (e.g., Model Teachers, lesson study cycles, Leadership Team Meetings, Reviews of Progress) sustained in schools as CLI reduces service coverage?

In addition, the study will examine exploratory questions, including the impacts of the CLI program on teachers' knowledge of literacy teaching and the differential impacts of the CLI program on reading achievement for students in different subgroups (e.g., ELLs, students with special needs, racial/ethnic minority students).

AIR will conduct a mixed-method experimental cluster-randomized controlled trial with 60 schools from the four urban LEAs participating in the Scale-up project: Broward County (FL) Public Schools, Denver (CO) Public Schools, Elizabeth (NJ) Public Schools, and Houston (TX) Independent School District. The diverse student populations in these LEAs will allow AIR to explore the overall impact of CLI as well as the impact for diverse student groups, such as ELLs and racial/ethnic minority students. Because the CLI program is an intervention intended to be implemented at the school level, schools will be assigned to treatment or control conditions. The cluster randomized assignment approach maintains the strength of random assignment—the provision of unbiased impact estimates—and will provide strong estimates of the impact of CLI's targeted school-level intervention (Bloom, Bos, & Lee, 1999).

Random assignment will be conducted in the spring of 2016, and schools assigned to the treatment condition will receive three years of services beginning in the 2016-2017 school year, as shown in Figure. Schools assigned to the control condition will conduct business as usual, with no exposure to CLI.

Although there is a possibility that teachers and students could select into CLI schools after randomization but before the start of data collection, baseline equivalence tests will be conducted to ensure group equivalence. Baseline characteristics that demonstrate baseline non-equivalence will be included in the statistical models described below:

Figure 13: Evaluation Timeline

Planning Phase Year 1: Spring 2016 2015-16 SY		Year 2: 2016–17 SY	Year 3: 2017–18 SY	Year 4: 2018–19 SY	Year 5: 2019–20 SY
Random Assignment of $N = 60$ schools; Obtainment of IRB Approval	CLI schools ($N = 30$)	CLI Services	CLI Services	CLI Services	No PD
	Control Schools ($N = 30$)	Business as Usual	Business as Usual	Business as Usual	Some CLI Services

Sampling and Statistical Power

For the study, AIR will use a sampling design in which program impacts and implementation are examined using data from students, teachers, and the CLI program. The sample of 60 schools will be recruited by CLI based on the following set of criteria: 1) school has not previously received CLI services; 2) school has three to four teachers per grade level; 3) school has not recently received or been slated to participate in any intensive intervention program, particularly literacy interventions, that is not district-wide during the course of the project; 4) school has at least 59% of students receiving free or reduce priced lunch; 5) school has at least 10% ELL students; and 6) school has at least 51% racial/ethnic minority students.

Within these schools, all teachers and students in grades K–3 classrooms will be eligible for inclusion in the evaluation samples, regardless of whether they are regular education, ELL, or bilingual classes. Students with special needs in these classes will also be eligible if they can be tested with reasonable accommodations, such as extra time.

To estimate the impact of the CLI program on student achievement over the course of the study, AIR will gather student outcome data for random samples of grade K–3 students from two distinct cohorts of students from the study schools. The first cohort of students will be sampled from CLI and comparison classroom rosters in the fall of 2016; the second cohort will be students sampled from classroom rosters in the fall of 2017.

Sampled students in both cohorts will be followed and tested each year, until they exit third grade. The spring of 2017 analysis sample will include Cohort 1 grades K–3 students. The spring of 2018 analysis sample will include Cohort 2 kindergarten students and Cohort 1 grades 1–3 students. The spring of 2019 analysis sample will include Cohort 2 grade 1 students and Cohort 1 grades 2–3 students.

To ensure sufficient subgroup sample sizes, the student test will allow for various accommodations for students with special needs and English Language Learners. For example, dual language learners will be given a short language screener (e.g. PreLAS), and students lacking sufficient proficiency to take only the English version of the test will be given the Spanish and then the English version of the test. Students in regular education classrooms who have an identified special need that cannot be accommodated will be excluded from the student assessment samples.

Based on rates found in the i3 Validation study of CLI, AIR expects an attrition rate of approximately 20 percent each year. Attrition could be due to denial of parental consent,

absenteeism, and mobility out of the study schools. As the study follows cohorts of students over time, AIR plans to oversample students in grades K–1 classrooms and undersample students in grades 2–3 classrooms, as those students will only be followed for one to two years.

With these parameters and expected attrition rates, AIR estimates that data will be collected in 56 schools for 6,944 students in the spring of 2017; 6,384 students in the spring of 2018; and 4,032 students in the spring of 2019. State academic records will be requested for all third grade students in the study schools, which is an estimated 3,360 students each year. Figure 14 summarizes the student sampling plan, which is designed to ensure a minimum detectable effect size (MDES) of 0.167-0.176, which is in the range of effect sizes found in the i3 validation study of CLI.¹ Power calculations were performed using the Optimal Design software (Spybrook, Raudenbush, Congdon, & Martinez, 2009).

Figure 14: Statistical Power for the CLI Evaluation Study

	Year 2: Spring 2017	Year 3: Spring 2018	Year 4: Spring 2019
Number of Schools	60	60	60
Grades Included	<i>Cohort 1</i> Grades K–3	<i>Cohort 2</i> Grade K <i>Cohort 1</i> Grades 1–3	<i>Cohort 2</i> Grade 1 <i>Cohort 1</i> Grades 2–3
Estimated Number of Students per Grade with Outcome Data (assuming 20% attrition each year)	24–36	22–28	22–24
Estimated Number of Students per School	124	114	72
MDES: Combined Cohort Student Achievement	0.157	0.160	0.166

¹ Statistical power of 80 percent with a two-tailed alpha of 0.05 was calculated using the following assumptions: (1) intra-class correlation of 0.10 at both student and school levels; (2) proportion explained variance by school-level covariates of 0.6 and blocking variable of 0.1.

All regular education grades K–3 teachers will participate in the study. All teachers will participate in the online teacher knowledge assessment, for an expected sample of 672 teachers each year and an MDES of 0.263. To estimate the impact of CLI on teacher practice, AIR will select a random sample of one teacher per grade (grades K–3) from each study school in the spring of 2017. These teachers will be observed in the spring of 2017 and 2018. Power analyses are based on a sample of 224 teachers in 2017 and 190 teachers in 2018, assuming attrition rates of 15 percent. These sample sizes result in MDESs of 0.421 and 0.455, respectively, which are smaller than the effect sizes found on teacher practice outcomes in the i3 Validation grant.

Data Collection

Figure 15 summarizes data collection plans from fall (F) 2016 to spring (Sp) 2020 as well as the key data domains and instruments. All data will be collected by trained AIR staff and/or AIR’s data collector contractors. To encourage participation of teachers and principals, AIR will identify and hire a part-time district liaison in each participating LEA to support the scheduling of data collection activities each year. Teachers will receive a monetary incentive for completing data collection activities and for assisting with the distribution and collection of parental consent forms. Students will receive a small incentive, such as stickers, at the time of data collection.

Figure 15: Data Collection Schedule for Study

Domain	Instrument	Year 2 2016–17		Year 3 2017–18		Year 4 2018–19		Year 5 2019–20	
		F	Sp	F	Sp	F	Sp	F	Sp
Student Literacy Achievement	STAR Reading assessment	K–3	K–3	K	K–3		1–3		
	State Test Data		3		3–4		3–4		
Teacher Knowledge	TK-SCE-R	K–3	K–3		K–3		K–3		K–3
Teacher Literacy Practices	ELLCO Observation		K–3		K–3				
Student Demographic	District Administrative		K–3		K–4		1–4		

Characteristics	Data								
Teacher Demographic Characteristics	Teacher Survey		K-3		K-3		K-3		
Professional Development Experiences	Teacher Survey		K-3		K-3		K-3		
Fidelity Implementation	CLI Records and Website Data	X	X	X	X	X	X	X	X
	Coach Logs	X	X	X	X	X	X	X	X
	PD Observations	X		X		X			
	Leadership Logs	X	X	X	X	X	X	X	X

AIR will measure program impact using the following data sources gathered from both treatment and control groups:

- STAR Early Literacy, STAR Reading, and STAR Spanish Reading.** The STAR is a 10–15 minute computer-adaptive assessment of reading, including foundational reading skills, vocabulary, and comprehension skills. AIR will administer the STAR Early Literacy to kindergarten students and STAR Reading to grades 1–3 students as a pretest in the fall of 2016 to Cohort 1 students and in the fall of 2017 to Cohort 2 grade K students. It will be administered as a follow-up impact assessment in the spring of 2017, 2018, and 2019. STAR was selected as it is a commonly used assessment, appropriate for the population of students, with strong reliability and validity (Brown & Coughlin, 2007).
- Student-Level Academic and Administrative Data.** Extant state reading assessment data for all third grade students in the study schools will be requested in the spring of 2017, 2018, and 2019. In addition, data for fourth grade students who were in study schools during the previous year will be requested in the spring of 2018 and 2019. Grades K–3 student demographic data will be requested in the spring of 2017, 2018, and 2019.
- ELLCO.** The Early Language and Literacy Classroom Observation (ELLCO) Tool will be used to observe one classroom per grade per study school in the spring of 2017 and 2018.

During observations of the literacy block, trained ELLCO observers will rate the teachers on 18 items, which will be combined to form two subscale scores: general classroom environment and language and literacy practices (Smith, Brady, & Clark-Chiarelli, 2008). These subscales align closely to the practices focused on by CLI coaches. Bilingual observers will be hired and trained to observe classrooms taught in Spanish.

- **TK-SCE-R.** The Teacher Knowledge of Student Content Engagement – Reading (TK-SCE-R) assessment is a 30-minute online assessment of teachers’ knowledge about early reading instruction. The TK-SCE-R is a research tool AIR developed and nationally validated with grant funding from the IES National Center for Education Research (Award Number: R3-5A100641-11).
- **Teacher Survey.** An approximately 15-minute online teacher survey will be administered in the spring of Years Two, Three, and Four to gather teacher demographic information and information on the hours and types of literacy-related professional development teachers participated in during that school year.

Data also will be gathered on the implementation of each component of the CLI program, as illustrated in the logic model: trainings, classroom resources, coaching, lesson-study cycles, Model Teachers, leadership meetings, and principal services. Data sources related to the implementation and sustainability of these components will include the following:

- **CLI Records.** In the 2016-17 through 2019-20 school years, CLI will provide AIR with records of resources delivered to teachers, attendance records for seminars and teacher and leader meetings, lesson study cycle participation records, and records of hours of coaching provided to teachers.

- **Website Data.** During the planning phase, AIR will work with CLI to ensure that teacher and principal access to its online coaching resources, including the Knowledge CELL system, can be tracked throughout the study. Information such as the number of logins, time of login, and time spent reviewing materials will be recorded and linked to other individual-level data.
- **Coach Log.** In the 2016-17 through 2018-19 school years, coaches will submit logs every two weeks to document the number of hours coached, the content focus of the coaching, and the types of coaching activities performed. This coach log will be linked with the CLI invoicing system, and completion of the log will be required prior to receipt of payment.
- **PD Observations.** In the 2016-17 through 2018-19 school years, AIR will observe up to 10 randomly selected seminars and meetings. Observers will use AIR-developed fidelity forms to track the content covered, activities used, and levels of participant engagement.
- **Leadership Logs.** In the 2016-17 through 2019-20 school years, the Model Teachers will complete monthly logs to document the occurrence of and activities conducted during Leadership Team Meetings and grade-level meetings led by the lead teachers.

Data Analysis

The procedures used to analyze the data will be driven by the evaluation's confirmatory, exploratory, implementation, and sustainability research questions.

Baseline Equivalence. To assess the degree to which random assignment resulted in equivalent groups, AIR will compare the treatment and control groups in their background characteristics. Baseline equivalence student and teacher characteristics, including student achievement and teacher literacy knowledge, will be tested using a two-level HLM model

including a treatment indicator and district fixed effects. Baseline equivalence of school characteristics will be estimated with a regression or logistic regression model.

Student Outcome Analyses. To determine the effects of the CLI intervention on student achievement in early literacy (Research Question 1), treatment and control groups will be compared at the end of Year Two, end of Year Three, and end of Year Four. Because of the hierarchical structure (i.e., students nested within schools), hierarchical linear modeling (HLM) techniques will be used to compare student outcome measures in the treatment and control groups. Student and school characteristics (e.g., student race, ELL status) that are expected to be correlated with student achievement will be included in the model as covariates to improve the precision of model estimates. The two-level HLM impact analysis model is illustrated as follows:

Level 1 (Students):

$$(1) \quad Y_{jk} = \beta_{0k} + \beta_{1k}(Pretest_{jk}) + \sum_p \gamma_{0p}(X_{jk}) + r_{jk}$$

$$(1) \quad Y_{jk} = \beta_{0k} + \beta_{1k}(Pretest_{jk}) + \sum_p \gamma_{0p}(X_{jk}) + r_{jk}$$

Level 2 (Schools):

$$(2) \quad \beta_{0k} = \sum_m \gamma_{0m}(Treatment_k * District_{mk}) + \sum_p \gamma_{0p}(Z_k) + u_{0k}$$

$$(2) \quad \beta_{0k} = \sum_m \gamma_{0m}(Treatment_k * District_{mk}) + \sum_p \gamma_{0p}(Z_k) + u_{0k}$$

In these equations, Y_{jk} is the outcome measure for student j in school k. $Pretest_{jk}$ is the pretest score (fall of Year 2 for Cohort 1 and fall of Year 3 for Cohort 2), and X_{jk} and Z_k are vectors of student- and school-level background characteristics. r_{jk} and u_{0k} are random error terms assumed to be independently and identically distributed. The student-level equation (1) includes a student fixed effect, β_{0k} , which is the dependent variable in the school-level equation (2). The school-level equation includes four treatment-by-LEA dummy

indicators. The model will generate an estimate for the impact of the CLI program on student achievement in each LEA ($Y_{0m} Y_{0m}$), and the overall impact across all four LEAs will be computed as a precision-weighted average impact.

AIR will use similar HLM models to explore the impacts on state achievement tests in third-grade and the sustained impacts in fourth-grade, using state-administered tests as our primary outcome measure. To estimate subgroup impacts at the student level, AIR will include interaction terms in the above model, interacting the treatment-by-LEA indicator with the moderators of interest (e.g., English Language Learners or students with special needs).

Teacher Outcome Analyses. To address the impact of the CLI program on teachers' classroom environment and classroom practices (Research Question 2) and the impacts on teacher knowledge, AIR will use a two-level model similar to the student outcome model described previously; however, teachers will be the Level 1 unit of analysis, and the outcome of interest will be observation scores or TK-SCE-R scores. The models will include baseline knowledge scores from the TK-SCE-R (no baseline measures of practice will be available). Exploratory analyses will be conducted using teacher practice and teacher knowledge as mediators for the impact of the CLI program on student achievement.

Implementation Analyses. To address the extent to which the CLI program is being implemented as intended (Research Question 3), AIR will use descriptive and inferential statistical techniques to analyze the available implementation data and create a fidelity of implementation index. AIR will work with CLI to identify indicators for each program component and use implementation thresholds identified during the i3 Validation grant for each indicator. For example, high implementation on the coaching indicator would require 95 percent of planned hours delivered. Individual-level fidelity ratings will be aggregated to the school

level, and scores for each indicator will be summed to create implementation scores for each component. Program components will have high fidelity of implementation if at least 80 percent of schools received a high-fidelity index score. Additional descriptive data analysis will be conducted focusing on 1) the relative quality of implementation at different stages of the intervention, based on coach log and PD observation data and 2) the relationship between school, LEA, and CLI coaching staff characteristics (e.g., years of CLI coaching experience) and the level of implementation.

Sustainability Analyses. To address the extent to which the CLI program has a continued presence in schools after CLI services end (Research Question 4), AIR will work with CLI to identify key practices and structures in schools and classrooms that are expected to continue. For example, as illustrated in the long-term outcomes column of the logic model (*see Figure 1*) it is expected that Model Teachers will continue to support grade-level peer learning through facilitating grade-level meetings and providing training on best practices to new teachers. AIR will gather data on these practices through leadership logs during the years of CLI implementation and, for Model Teachers remaining in the school, in the year after CLI implementation ends, in order to track the continued occurrence of these practices and to identify patterns of these activities.

AIR will also interview a sample of principals on their perspective of CLI model sustainability. Finally, AIR will use a repeated measures HLM model to analyze data from the teacher knowledge test administered during Years Two through Five (three years of CLI implementation and one year after CLI implementation has ended) to determine whether model teachers' knowledge of literacy teaching increases and is sustained.

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